



IDAHO COMMISSION ON AGING


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C.L. "Butch" Otter, Governor
Kim Wherry Toryanski, Administrator

Transmittal # **6**

January 2, 2008

To: Workforce Development Council

From:  Kim Wherry Toryanski, Administrator
Melinda Adams, Older Worker Coordinator
Idaho Commission on Aging

Subject: National Governors Association (NGA) Policy Academy on
Civic Engagement: Engaging Seniors in Volunteering and Employment

Action Requested:

- (1) Decision to participate in the National Governors Association (NGA) Policy Academy as a Workforce Development Council project.
- (2) Solicitation of suggestions (content and process) for Idaho's Policy Academy application.

Background Information on NGA Policy Academy

The NGA Center for Best Practices has invited states to apply for a Policy Academy on developing state strategies to increase the proportion of seniors who are employed and who volunteer.

The NGA Policy Academy is an intensive form of technical assistance that brings together influential state policymakers with peers from other states and national experts to develop state specific responses to a public policy issue. Participants in the Civic Engagement Policy Academy will work through a rigorous team-based process to develop strategies to strengthen the following objectives.

- Identify the needs of the labor market to fully engage older adults in employment and volunteer activities.
- Conduct a comprehensive review of state policies that affect older adults who choose to remain in or reconnect to the labor market.
- Initiate policy changes based on the labor market needs identified and the review of state policies.

Our vision is to ensure that all Idahoans retain their autonomy to determine their own life course as they age.

- Develop new information tools and improve existing systems that connect older adults to employment and volunteer opportunities.
- Enhance training and educational opportunities for older workers.
- Position the state as a model for promoting the civic engagement of older adults.

The NGA Policy Academy is a year-long process that requires a substantial commitment from the participating state teams to be successful. Key Policy Academy events include the following:

- Initial On-site Strategic Planning Meeting with NGA staff (1 day).
- Intensive Policy Academy Meeting of all state teams, NGA staff and leading experts meeting (3 days).
- Post-Academy Meeting Follow-up and Technical Assistance.

Each state's proposal must identify a team of policymakers with the authority to influence change in their state. The team must consist of an interdisciplinary core team and may include a larger home team (or working group) that broadens and complements the core team membership. The core team (comprised of high level representatives from the Governor's office and key agencies/organizations) is required to participate in the key Policy Academy events.

The Civic Engagement Policy Academy consists of two rounds. The first round began in May 2007 when the selection goal was seven to eight states. Eight additional states will be selected to participate in a second round of the Civic Engagement Policy Academy in early 2008. Although Idaho prepared a draft application for the first round (see attached Draft), Idaho's state leadership team opted to wait until the second round to apply in view of gubernatorial changes resulting from the 2007 elections, the reconstitution of Idaho's Workforce Development Council, and the need to ensure that this project is consistent with the goals and objectives of the newly constituted Workforce Council.

Consistency of Project with Workforce Council Goals

The intent of the Policy Academy is to help states develop strategies to increase the number of seniors who engage in employment and volunteer activities.

The purpose of the project is consistent with the following goal articulated within the Mission of the Governor's Workforce Council.

<i>Goal</i>	Idaho's older workforce will be highly skilled, committed to continuous learning and aware of opportunities available in the market place and the resources to remain personally competitive.
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<i>Objective</i>	Increase the size and skills of the Idaho workforce.
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Strategies

- Identify and disseminate strategies that retain productive mature workers and increase their technology skills
- Optimize participation of the untapped labor pool using various strategies to identify and engage prospective older individuals who need and want to work, dislocated workers, minorities, people with disabilities, offenders and the educationally and economically disadvantaged.
- Provide opportunities for and encourage life-long skill development for Idaho's current and transitional workforce.
- Encourage the use of workplace flexibility to attract and retain a workforce.
- Explore policies to encourage personal savings for retirement.

Foundation for Idaho's Policy Academy Application: Key Components (Draft)

The Governor's Workforce Council structure would be used as the framework. The Policy Academy Team would function as an *ad hoc* committee under the existing Council structure.

Idaho's application would feature senior "employment" as the primary focus; volunteer engagement would be a secondary focus.

Please review the *Draft Civic Engagement Application* (attached) which addresses the approach required by the NGA in the proposal. While sections of the Draft Application will need to be revised, your comments and suggestions for improving the proposal are essential for the success of the project. Each state's proposal is required to define the problems that the state plans to address and provide evidence of the state's readiness for change. It is crucial that the proposal contain a vision of intended changes and possible strategies for achieving them.

Benefits of Policy Academy Participation

The Policy Academy is a one year effort (May 2008 through April 2009). If selected, our Idaho Team would receive significant technical assistance in:

- Reaching consensus on our priorities;
- Identifying outcomes that define success in addressing our priorities;
- Formulating a sustainable plan to achieve our outcomes;
- Developing ways to measure progress; and
- Implementing our plan.

Funding

NGA funding for the effort is limited. NGA will pay the lodging and transportation costs for 8 people from each selected state to attend the 3-day Policy Academy meeting. NGA also pays the cost of the NGA staff's On-site visit to Idaho. Existing resources would need to support the remainder of the effort.

Please submit comments, suggestions and additions to Melinda Adams and Cheryl Brush by February 1, 2008.

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Enclosure: Draft Application, Civic Engagement, January, 2008

Draft: Jan 2, 2008

State of Idaho Civic Engagement: Engaging Seniors in Volunteering and Employment

1. Idaho's Need: Advancement of Senior Civic Engagement and Employment

The following describes Idaho's current social, economic and labor market environment and the challenges faced in addressing workforce and community volunteerism needs.

High Retirement Rates Forecast for the Idaho State Government

Based on data provided by the Idaho Public Employees Retirement System (PERSI), the average age at which employees retire from employment with the State is 62. Currently, 36% of State classified and nonclassified employees who are members of PERSI are 52 and above. The average age of state employees is 47; the average age of those hired into the State in the past year has been 36-40. In addition, 49% of all classified employees and 52% of all nonclassified employees (excluding higher education) are 46-60. Only 4.6% of the current classified workforce and 2.2% of the nonclassified workforce is under 26. (Data excerpted from the FY 2009 "Report to the Governor: Change in Employee Compensations & Benefits Report").

The State of Idaho's Division of Human Resources also conducted an age audit on state employees in December 2006. The audit revealed that 37.9% of all state employees are *currently eligible or will be eligible* to retire within 10 years. The following depicts the level of impending retirements forecast for state departments represented by the Idaho Policy Academy team.

Idaho Employees Eligible to Retire Within the Next 10 Years By Agency		
Agency Name	Number	Percent
Idaho Commerce & Labor	206	33.1%
Idaho Commission on Aging	10	58.9%
Public Employees Retirement System	31	50.1%
Idaho Department of Health & Welfare	944	32.6%

Experiencing An Unprecedented Record Of Low Unemployment in Idaho

The overall rate of unemployment in Idaho in October 2007 was 2.5% down from 3.3% at the same time last year. There are parts of Idaho where the rate is even lower, such as the City of Boise where the rate is 0.9%. It is generally accepted by most labor economists that an unemployment rate of approximately 5% is full employment. The remaining 5% represents those that are unemployable with their current skill sets.

This means that in the current labor market in Idaho, there are more positions available than there are qualified applicants to fill them. Idaho's unemployment rate has been under 4% for 30 months in a row remaining below the national rate since October 2001. While such low unemployment is an enviable predicament, it poses challenges in assuring the continued availability of a qualified workforce—a critical factor in persuading expanding companies to locate in Idaho.

Idaho's Aging Workforce

The challenge is compounded by the large wave of Baby Boomers expected to leave the workforce over the next few decades. If Baby Boomers replicate the retirement behavior of previous generations, the services of many highly skilled, experienced workers will be lost. In view of the baby dearth that followed the Baby Boom, there will not be many new workers to replace them, even as the senior population grows significantly. Labor force growth is expected to fall from 1.1% per year in the 1990's to 0.35% per year in the period 2010 to 2020.

In Idaho the aging of Baby Boom workers led to an increase in the proportion of the workforce 45 years and older from 1990 to 2002. In 1992 about 75% of Idaho workers were 14-44 years old. By 2002 that figure had dropped to about 68% of workers. In 1992 15% of Idaho workers were 45 to 54 years old and 20% were in that age group in 2002. Planners anticipate this proportion will grow even more rapidly over the next two decades. The economic and policy implications are far reaching.

More Volunteers Needed in Idaho Educational and Aging Services Sectors

Idaho's overall record of volunteer activity is acceptable (see below). However, a need exists to increase Older Adult Volunteering (age 65 and older) and Baby Boomer Volunteering (born 1946 to 1964). Idaho's rate of volunteerism in these categories, although higher than the national average, falls short of those attained in many other states. Emphasis will be placed on increasing volunteerism in the educational arena (tutoring, mentoring, teaching, youth services) and the aging services arena (services and programs serving the elderly).

Volunteer Trends and Highlights

The following trends and highlights resulted from a study of volunteer civic engagement in Idaho. The study was conducted by the Corporation for National and Community Service.

- In 2006, 390,000 Idaho volunteers dedicated 62.9 million hours of service.
- Idaho was one of five states in the nation where tutoring or teaching was the most popular activity for volunteers. Idaho was also one of only seven states in which mentoring youth was one of the top four activities.
- On average, 76% of Idaho volunteers who served in 2005 continued to serve in 2006, making Idaho the second-highest state for volunteer retention.
- In addition to the 390,000 Idaho volunteers in 2006, almost 38,000 people participated informally by working with their neighbors to improve the community.
- Overall, 40.8% of people in Idaho engaged in civic life by volunteering, working with their neighbors, or attending public meetings.
- Since 1989, Idaho's Volunteer Rate has consistently exceeded the National Volunteer Rate.

Idaho Volunteering by Age and Gender							
Age	Median Hours	State Rate	National Rate	Category	Median Hours	State Rate	National Rate
16 - 24 years	40	29.1%	23.4%	Age Group			
25 - 34 years	72	37.0%	24.7%	College Students	52	48.0%	29.6%
35 - 44 years	72	38.9%	33.3%	Baby Boomers	60	38.7%	32.2%
45 - 54 years	52	40.9%	32.2%	Gender			
55 - 64 years	82	38.1%	29.3%	Male	66	32.9%	24.3%
65 + years	135	26.8%	24.4%	Female	64	37.4%	31.6%

2. Environmental Scan and Readiness for Change

The following are indicators of Idaho's readiness to design and implement measurable change in policy and practice related to the civic engagement of older workers.

Certified Public Manager Program

Designed to assist in succession planning and to build leadership within state government, a Certified Public Manager Program was implemented by the State of Idaho 7 years ago. The program is built upon the premise that “great government needs great managers.” The Idaho Certified Public Manager program is a nationally accredited training and development program for public sector managers and supervisors. The program is tailored for public employees to enhance their career paths, thereby reducing employee turnover.

The state operates the program in conjunction with the School of Business and Economics at Boise State University. As of December, 2007, the program has graduated 242 candidates.

Regional Economic Forums

Idaho’s Workforce Development Council and Economic Advisory Council hosted six regional forums (August, 2006) as follow-up to an earlier Economic Symposium. The purpose of these sessions was to hear the views of business and community leaders on the most pressing economic development, workforce development and related education issues in each region of the state.

Common themes that emerged from the forums included the need to (1) identify older individuals who need and want to return to work as a strategy to access the untapped labor pool and (2) help employers recognize the workplace value of mature workers.

Governor’s Summit on Aging

Similarly, the Governor’s Summit on Aging (September, 2006) gathered key stakeholders, employers and business personnel, policy makers, and seniors as attendees. At the conclusion summit attendees defined what they viewed as the most pressing issues facing Idaho’s aging population and suggested solutions.

Key Workplace Issues and Volunteerism

How can senior workers be used to address the pending labor shortage?

- Provide protection for individuals to return to the workforce without jeopardizing retirement benefits.
- Retraining opportunities for seniors (such as computer literacy).
- Create a clearinghouse of skills of seniors - match with employers who need short-term, part-time workers (use existing systems).

- Increase employer awareness of the benefits of hiring older workers.
- Create an Employment Opportunities Task Force to address workforce needs of older Idahoans. *Note: The Policy Academy core and home teams would fulfill this recommendation.*

What can we do to encourage businesses to provide workplace flexibility?

- Conduct advocacy/awareness campaign regarding the value of older workers and workplace flexibility.
- Provide a tax credit for employers who hire seniors (55+).
- Train employers on workplace flexibility options such as job sharing, job restructuring, part-time worker pools, and flex time, etc.
- Provide mentoring from companies that accomplish workplace flexibility.

How can volunteerism be used to ameliorate community and workforce needs?

- Increase the use of older volunteers in schools (mentors, tutors, educational aides).
- Explore the use of an “all volunteer” pool of transportation support to address the mobility needs of older and disabled Idahoans.
- Increase the use of older individuals as volunteers to meet a variety of community needs (Gatekeeper Program, Neighborhood Care Buddies, Telephone Reassurance, etc.).

US Senate Bill 709: The Older Worker Opportunity Act of 2007

This bill was introduced in the U.S. Senate on February 28, 2007. Senator Larry Craig, Idaho’s senior Senator, is a co-sponsor of the Bill. As of January 2, 2007, the bill has not proceeded forward. However, Idaho’s Policy Academy Team will consult with Idaho’s congressional delegation on the workforce issues addressed in SB 709. The formal summary of the Bill is:

“To promote labor force participation of older Americans, with the goals of increasing retirement security, reducing the projected shortage of experienced workers, maintaining future economic growth, and improving the Nation’s fiscal outlook.”

Key features follow.

- Implementing a tax credit for employing older worker in flexible work programs.

- Allowing an employee to work a reduced work week without losing health insurance coverage.
- Entitling the employee to participate in the retiree health benefits plan except that service is credited on a pro-rata basis.
- Encouraging an employee to work beyond traditional retirement age without forfeiture of pension benefits.

2. Explanation of Idaho's vision, goals, proposed strategies, and outcomes that it hopes to achieve during the Policy Academy process.

The Policy Academy's purpose is consistent with the mission and goals of the Governor's Workforce Development Council as articulated in the following excerpts.

Objective: Increase the size and skills of the Idaho workforce.

Strategies:

- Optimize participation of the untapped labor pool using various strategies to retain older workers and engage people with disabilities, offenders, and the educationally and economically disadvantaged.
- Encourage use of workplace flexibility to attract and retain a workforce.
- Identify and disseminate strategies that retain productive, mature workers and increase their technology skills.
- Provide opportunities for and encourage life-long skill development for Idaho's current and transitional workforce.

Specific action items, based on existing input from stakeholders, may include the following.

- An awareness campaign designed to increase general public and employer awareness of the value of older workers (paid and unpaid).
- The development of a model to tap the hidden labor force of older individuals interested in returning to the labor force.
- A review of existing retirement policies that penalize individuals who want to work beyond traditional retirement age or return to work after retirement.
- The identification and dissemination of strategies that retain productive older workers with particular emphasis on the critical role of workplace flexibility in expanding the pool of available workers contributing to the competitiveness of Idaho's industries.
- Increased use of older volunteers in the educational and aging services sectors.

3. Breadth, Influence, and Knowledge of the Idaho Policy Academy Team

Karen McGee, Special Assistant to the Governor, Health & Welfare, will serve as the Team Leader. Idaho's Policy Academy Team(s) will operate within the Governor's Workforce Development Council structure. To the extent possible, Idaho team meetings will be held in conjunction with our Governor's Workforce Development Council meetings. The Core Team members listed below (including staff). Biographical information for Core Team members is contained on Attachment 1. Letters of Commitment from each Core Team member are also enclosed. Attachment 2 enumerates the Home Team invitees.

Core Team Members:

Ms. Karen McGee, Special Assistant, Health & Welfare
Office of Governor C. L. "Butch" Otter

Con Paulos, State Workforce Development Council Chair
Owner, Con Paulos, Inc.

Roger B. Madsen, Director
Idaho Department of Labor

Kim Wherry Toryanski, Administrator
Idaho Commission on Aging

Other Core Team Members to be appointed by Governor Otter

Staff Designated to Assist the Team Leader

Idaho Department of Labor will be the lead agency, and the Idaho Commission on Aging will be fully supportive and co-staff the team. Designated staff:

Cheryl Brush, Workforce Policy Advisor
Idaho Department of Labor

Melinda Adams, Statewide Older Worker Coordinator
Idaho Commission on Aging

ATTACHMENT #2

Home Team Committee

Con Paulos, State Workforce Council Chair, will appoint a larger committee (home team) that broadens and supports the work of our core team. Prospective invitees include the following:

Home Team Committee members to be invited to participate by Con Paulos

Others to be identified based on the Action Plan which will be developed by the State Team.

s/Melinda/NGA Policy Academy/Application Draft January 2, 2008